

Closing an Inactive Episode

If a client has been inactive longer than 30 days, their case should be closed. If you receive a new authorization on a closed client without a referral, please contact the WITS Help Desk and request the closed episode to be reopened.

1. **Getting here:** Login, select the **Facility**, select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, find client, select **Activity List**.

2. Click **Program Enroll** on the Navigation Pane.

3. Click **Review** on the open program enrollment.

Idaho WITS Training

User: Baslin, Crystal
Loc: RSS Stand Alone, RSS Stand Alone - Boise
Client: Amariyllis, A | 201011860000014 | Case #: 1

Printable View

The filter you created has been applied to the client list.

Client Search

Agency: RSS Stand Alone

First Name: [text box]
Last Name: [text box]
SSN: [text box]
Idaho WITS Training Client ID: [text box]
Unique Client Number: [text box]
Treatment Staff: [dropdown]
Case Status: All Clients
Other Number: [text box]
Include Only Active Consents: Yes

Facility: [dropdown]
Last Name: [text box]
DOB: [text box]
Provider Client ID: [text box]
Primary Care Staff: [dropdown]
Intake Staff: [dropdown]
Number Type: [dropdown]

Clear Go

Client List (Export) Add Client

| Unique Client # | Full Name | DOB | SSN | Gender | Actions |
|-----------------|---------------|----------|-------------|--------|---|
| 201011860000014 | Amariyllis, A | 1/1/1986 | 000-00-0000 | Female | Profile Activity List Linked Consents |

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Printable View

Client Activity List

| Activity | Activity Date | Created Date | Status | Actions |
|---|---------------|--------------|-----------|------------------------|
| Client Information (Profile) | 7/1/2013 | 8/14/2013 | Completed | Review |
| Intake Transaction | 7/1/2013 | 8/14/2013 | Completed | Review |
| Client Program Enrollment (Adult Recovery Support Services) | 7/1/2013 | 8/14/2013 | Completed | Review |
| Encounter Summary | 2/14/2014 | 8/19/2013 | Completed | Review |

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Printable View

Program Enrollment

| Program Name | Start Date | End Date | Facility | Notes | Actions |
|---------------------------------|------------|----------|-------------------------|-------|---|
| Adult Recovery Support Services | 7/1/2013 | | RSS Stand Alone - Boise | | Review Delete |

Finish

4. Enter the End Date.

5. Select the appropriate Termination Reason.

6. Click Finish.

7. Click Intake on the navigation pane.

8. Enter the Date Closed, then click on Save & Close the Case.

9. Click Finish.

Idaho WITS Training

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Printable View

Program Enrollment Profile

Facility: RSS Stand Alone - Boise
Days on Wait List: 0
Start Date: 7/1/2013
End Date: 4/1/2014

Program Name: Adult Recovery Support Services
Program Staff: Buskey, Michelle
BPA Authorization #:
Termination Reason: Transferred
Notes:

Cancel Save Finish

Idaho WITS Training

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Printable View

Program Enrollment

| Program Name | Start Date | End Date | Facility | Notes | Actions |
|---------------------------------|------------|----------|-------------------------|-------|---|
| Adult Recovery Support Services | 7/1/2013 | 4/1/2014 | RSS Stand Alone - Boise | | Review Delete |

Finish

Idaho WITS Training

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Loc: RSS Stand Alone, RSS Stand Alone - Boise
Client: Amariyllis, A | 201011860000014 | Case #: 1

Generate Report Printable View

Intake Case Information for Amariyllis, A

Intake Facility: RSS Stand Alone - Boise
Intake Staff: Buskey, Michelle
Initial Contact: Other
County of Res: BEAR LAKE
Source of Referral: Individual/Self
Referral Contact:
[Add Referral Contact Info](#)

Case #: 1
Case Status: Open Active
Date of First Contact: 7/1/2013
Intake Date: 7/1/2013
Pregnant: No
Due Date:
Priority Population: IDHW
HIV Tested?
Past IV Drug Use: Yes

Presenting Problem (In Client's Own Words)
training

Inter-Agency Service
Child Protective Services (CPS)
Court/Legal Interface
Developmental Disabilities
Domestic Violence

Inter-Agency Service Selected
*None

Domains
ATR

Selected Domains
Substance Abuse

Date Closed: 4/1/14 [Save & Close the Case](#)

Cancel Save Finish